C2710-1 - 10/14/87

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$1.50 a copy; $59 a year

October 12, 1987

NEWSPAPER

WASHINGTON DC 20014
4520 EAST-WEST HWY #800
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# Advertising Age

Crain's International Newspaper of Marketing. In Two Sections. Section 1.

# P&G widens power base

## Adds category managers

By LAURIE FREEMAN

Procter & Gamble Co., in a reorganization that could affect ad agencies and their commissions, has created a new tier of executive decision-makers to oversee products grouped by category.

The new structure was disclosed internally last week in a 12-page memo to employees of the Cincinnati-based marketer. It represents the first manifestation of P&G's yearlong experimentation with brand-management system revisions (AA, April 20).

The company's brand managers, however, are not affected directly by the change.

The move signals a decentralization of authority from the division level, where VPs formerly wielded total authority for all divisional products, to a sublevel of general managers accountable to them.

P&G acknowledged as much when a spokeswoman characterized the change as shifting "more decision-making down to the operating levels."

"P&G has found that the [retail] trade doesn't think in terms of brands," said Gordon Wade, a former P&G brand manager and now principal of the Cincinnati Consulting Group. "They think in terms of categories, and whether [their store] is getting its fair share of the profit dollars. To them, it doesn't matter if those sales are coming from Tide, Cheer or Bold, just as long as they make a [detergent] sale."

Although P&G declined to describe the restructuring further, a P&G staffer said that, in the detergent division, three category general managers have been named. One will handle laundry products; another will have dishwashing products (including light-duty liquids and automatic

(Continued on Page 99)

Dennis Franklin Holt has risen from poverty to power.

# Western's Holt driven to build buying empire

By JENNIFER PENDLETON

LOS ANGELES—He is probably one of the most powerful men in advertising on the West Coast. But power isn't a subject Dennis Franklin Holt likes to talk about. He'd rather wield it quietly.

And wield it he does. As president-ceo of Western International Media, he controls more money spent on spot TV than any other media buyer nationally. That means Western buys more spot TV in the U.S. than Foote, Cone & Belding Communications ($367 million), J. Walter Thompson Co. ($358 million), Young & Rubicam ($324 million) and D'Arcy Masius Benton & Bowles ($299 million).

Word around town is that Western is in line for an estimated $50 million worth of Walt Disney Co. media buying, now at

(Continued on Page 100)

Family and school situations are the subjects of new TV commercials for the Apple II line, via BBDO.

## Apple gears new spots to managers

# Mac branches out

By CLEVELAND HORTON

Apple Computer is moving out of the boardroom and into the workplace with six new TV spots for its Macintosh computer. The commercials, breaking Oct. 17, are part of the company's $58 million ad campaign for 1988.

The new Mac spots and a new Apple II campaign that starts today are the first Apple commercials under the direction of Steve Hayden at BBDO Worldwide.

Mr. Hayden, now BBDO executive creative director, created Apple's "1984" blockbuster Super Bowl commercial while at Chiat/Day, Los Angeles. He joined BBDO in 1986, shortly after the agency won the Apple account. BBDO's New York and Los Angeles offices handle Apple's advertising.

To build on the high level of viewer awareness of Apple's current commercials, the Cupertino, Calif.-based personal-computer marketer is maintaining the "slice of reality" look of BBDO's first Mac campaign.

But while the previous campaign was aimed at ceos, the new spots illustrate how the Macintosh improves the professional lifestyle of managers through a series of vignettes.

Joe Pytka directed the new spots as well as some of

(Continued on Page 97)

# Last Minute News

### Control Data to buy SAMI/Burke

MINNEAPOLIS—Control Data Corp. reportedly has signed a letter of agreement with Time Inc., New York, to acquire its SAMI/Burke research subsidiary. The deal calls for a cash down payment with final purchase price based on SAMI/Burke's performance in the next three years. Arbitron Ratings Co. already is a unit of Control Data.

### Panasonic picks four finalists

SECAUCUS, N.J.—Panasonic Co. has asked several agencies for speculative creative presentations for its $25 million Panasonic and Technics consumer electronics accounts. The agencies are Ally Gargano/MCA Advertising; Grey Advertising; Levine, Huntley, Schmidt & Beaver; and Young &

(Continued on Page 8)

# Highlights


### Liquor spots may go on ice 12
A campaign is under way to close one of the only broadcast outlets for liquor advertising: Spanish-language TV stations. A coalition of 19 groups says it will ask liquor marketers to stop buying time on hispanic stations and ask the stations to stop accepting the business. If that doesn't work, the coalition will pressure the stations. Liquor commercials have been appearing on Spanish-language stations without incident for almost a decade.

### Tuning in to New Age 37
A new age for New Age seems to be dawning. The soft instrumentals and jazz music—characterized by some as "Yuppie Muzak"—often is touted as the radio format of the future. But with the help of a distributor beaming a New Age program by satellite to affiliated stations nationwide, it's becoming the trend of today. Radio industry sources predict at least one station in each of the Top 100 markets will change to the New Age format by yearend.

### Campbell's traveling on European plan 40
Campbell's U.K. Ltd. is entering the European frozen-food market with two product lines adapted from the U.S. and later plans to launch a series of new frozen products. This month Campbell's is introducing frozen soups in Britain and a line of vegetables and seafood in pastry in November.

### Isuzu looking for last laugh 66
American Isuzu Motor Co. is committed to another full year of lying. The auto importer plans to stick with its "Liar" campaign, featuring actor David Leisure as Joe Isuzu, at least through the 1988 model year. This decision comes despite industry skepticism that the entertaining campaign may be a one-line joke wearing thin.

### Winners among the sinners 82
*Harper's* will show, in next month's edition, that when it comes to advertising sin, the top U.S. agencies are up to the challenge. The moral morasses that Gary Hart, Ivan Boesky and the Rev. Jim Bakker have waded through recently got the *Harper's* editors to thinking: Why not ask the leading ad agencies to develop a campaign promoting the Seven Deadly Sins —avarice, envy, gluttony, lust, pride, sloth and wrath? The results will be published in *Harper's* November issue, hitting newsstands later this month.


## INTERNATIONAL


### Unilever cleans up in Madrid 68
Unilever is repositioning its Luminoso dishwashing liquid in Madrid after only 18 months on the market to win a bigger share of a category it dominates elsewhere on the Continent. This is Unilever's first dishwashing liquid entry in Spain.

### Making up in Japan 69
Just three years after introduction, cosmetics for men have become so popular in Japan they now account for an estimated 15% of Japan's $1.4 billion cosmetics market. Some link the success of male cosmetics to the growth in unisex fashions, health and fitness.

### South Africa in the sights 70
A group of 20 South African businessmen, identified only as the South African Business Community, is funding a $1 million international advertising campaign to persuade the international community not to isolate their country. Ads show different black-and-white animals through the sights of a gun and compare their struggles for survival to that of South Africa, which is under fire for apartheid, its policy of racial segregation.


## OTHER NEWS

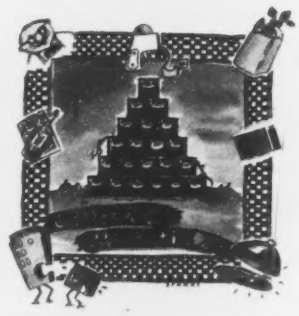
The new fall season ratings war is young, but the Big 3 networks already have midseason reinforcements. ABC and CBS probably will need to call up the most reserves for midyear, agency sources said. Page 46.

Prudential Insurance Co. of America is offering consumers four pieces of the "Rock" in a new campaign that stresses service, departing from Prudential's previous focus on products. The campaign underscores the importance of the company's 20,000 agents. Page 48.

There's a whole lotta kissing going on in General Motors Corp.'s 1988 divisional car advertising. Of course, there's always been a whole lotta kissing going on in cars, never mind car ads. And since GM divisions develop their ads independently from each other, it's partly coincidental that new TV spots for Chevrolet, Cadillac and Pontiac all feature music and visual montages, with those montages including smooching scenes. Page 84.

Cool it, California. Big-talking Texas has its own wine cooler. Hill Country Cooler is marketing Frischer, the first Texas-produced wine cooler made only with Texas wines. Page 90.

## SPECIAL REPORT



***Grocery marketing**—As marketers snap up small, entrepreneurial companies to fill hot-selling niches, grocery retailers are expanding their space to accommodate a robust increase in new products, both food and non-food items. Mix in the space demands of expanded departments such as on-site bakeries, delicatessens and floral departments, and supermarkets are taking a much more critical look at what items will move or not, putting ever more pressure on grocery marketers to come up with the right selections. Starts after Page 52.*

## REGULAR FEATURES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Vol. 58, No. 44—ADVERTISING AGE (ISSN 0001-8899) is published weekly except semiweekly the fourth week in March and the fourth week in September at 740 Rush Street, Chicago, Ill. 60611-2590. Second-class postage paid at Chicago and additional mailing offices. Send address changes to ADVERTISING AGE, Circulation Department, 965 E. Jefferson, Detroit, Mich. 48207. Microfilm copies are available from University Microfilms, 300 N. Zeeb Rd., Ann Arbor, Mich. 48103. Microfiche copies are available from Bell & Howell, Micro Photo Division, Old Mansfield Rd., Wooster, O. 44691. $1.50 a copy. $59 a year, $104 two years. Add $104 per year for air delivery to Europe & Middle East. Add $34 for surface mail to all other foreign countries. WILLIAM STRONG, VP/circulation; JOHN HUFFMAN, fulfillment director; DAVE KELLEY, circulation manager. Four weeks' notice required for change of address. Address all subscription correspondence to Circulation Department, Advertising Age, 965 E. Jefferson, Detroit, Mich. 48207 (313) 446-0494

# Jitters rising over economy

**An Advertising Age roundup**

**U.S. marketers and ad agencies appear to be shifting ad strategies and cutting costs as concerns mount about renewed inflation and an economic downturn.**

**Last week's huge stock-market decline and gloomy economic forecasts of a recession next year**

*Staff cutbacks at JWT, TLK, P. 98*

**are sending jitters though the industry, according to an informal ADVERTISING AGE survey of executives.**

**This is occurring despite the anticipated quadrennial ad-spending upturn from elections and the Olympics.**

**"Businesswise, confidence levels are high. But if you look deeper you sense an uneasiness in financial markets," said Joseph Wahed, senior VP-chief economist, Wells Fargo Bank, San Francisco. "It's a feeling I've never felt before. People expect inflation. They're panicking."**

**The degree of concern varies among product categories, with food industry observers, for example, less worried than more vulnerable service businesses.**

**Many agency executives are preparing for the worst.**

**"We have not heard voices of doom," said Joel Hochberg, president of DDB Needham Worldwide's Chicago office. "On the other hand, the reality is that major clients are vigorously scrutinizing budgets," a practice he said has intensified in recent years.**

**"The business is much tighter than it's ever been," he said, "and it's harder for agencies to turn a profit."**

**Mr. Hochberg said DDB Needham plans no staff cutbacks in Chicago, but other agencies there and elsewhere are pruning their ranks in greater numbers.**

**In the Southwest oil belt, agencies already have felt the ef-**

*(Continued on Page 98)*

# Politics hold up Fla. ad tax repeal

**By STEVEN W. COLFORD**

Advertisers awaiting the inevitable—relief from Florida's 5% tax on services—are consoling themselves with the belief that state politics is the only stumbling block remaining.

This week Florida's 40 senators and 120 representatives will return to Tallahassee for another try at hammering out a compromise.

The need for yet another legislative stab at the ill-fated tax became necessary when Gov. Bob Martinez promised to veto what the Legislature sent him last week—a bill exempting most of advertising but retaining the tax on most other services.

Gov. Martinez wants the whole tax repealed and replaced with another revenue source to make up for the estimated $750 million the services tax would have brought in.

Separately, Beatrice Cos., Johnson & Johnson, Kimberly-Clark Corp., Procter & Gamble Co. and Rust-Oleum Corp. resumed, at least in part, buying spot time in Florida, said Blair Television VP Leo McCourtney.

Oakland, Calif.-based Clorox Co., the first advertiser to drop Florida from its spot-buy list after the tax was adopted July 1, also has resumed advertising, said Jim Donnelley, general sales manager, WCPX-TV, the CBS affiliate in Orlando. Clorox VP Fred Reiker, however, insisted the company had not resumed any spot purchases in Florida for Clorox liquid bleach.

"For those who have come back, their levels are not where they were," Mr. Donnelley said. "I think it will take at least a year for them to return to where they were before. And for some, it might never; advertisers might take that money

*(Continued on Page 96)*

## Industry plans PR effort

# Airlines attack

**By JENNIFER LAWRENCE and STEVEN W. COLFORD**

After months of public outrage over deteriorating service, the airline industry is planning a public relations campaign to pressure the federal government to improve the air traffic control system.

The nation's top airline executives have solicited proposals from eight PR agencies to form a strategy to make this a national priority.

Budget for the long-term campaign has not been set, but it is expected to be a multimillion-dollar effort. In addition to PR and lobbying, paid advertising will be used.

The agencies are: Burson-Marsteller; Daniel J. Edelman Inc.; Doremus Porter Novelli; Hill & Knowlton; Manning Selvage & Lee; and Robinson, Lake & Lerer, all New York; Fleishman-Hillard, St. Louis; and National Strategies & Marketing Group, Washington.

While several air carriers have responded to public criticism through individual service-oriented ad campaigns (AA, June 29, *et seq.*), this is the first cooperative effort to mount an industrywide campaign.

By explaining how the air traffic

*(Continued on Page 96)*

*West Coast News, P. 98.*

# Ad-sales ratios by industry compiled

OAK BROOK, ILL.—Compiling data from more than 5,000 10-K reports filed by publicly held companies, Pansophic Systems has created its advertising-to-sales ratios report for about 250 industries.

The table on this page is part of Pansophic's "1987 Ad$ Forecasts," which includes ad-to-gross margin ratios and advertising growth rates by industry for 1986 and '87 and forecasts for 1988.

In addition, the study forecasts 1988 advertising investments for more than 4,000 individual companies, rates advertising effectiveness for the companies and their industries and measures ad spending stability.

In the advertising-to-sales ratio table shown here, the various industries are categorized by Standard Industrial Classification code numbers.

Figures show combined advertising expenditures reported for companies in the categories as a percent of total sales reported for the categories, and as a percent of gross margin (net sales minus cost of goods sold). It also shows the percent of ad expenditure growth for 1986 compared with 1985.

Pansophic notes that cautious interpretation is required because the data were compiled from financial statements rather than media auditing services.

What expenses are included under advertising expenditures filed in 10-K reports may vary from company to company. The reports typically include both media expenditures and such related expenditures as costs of collateral literature and production. And in some categories, the figures include catalog advertising, point of purchase and direct mail.

Pansophic also notes that within many industry sectors, individual companies may spend significantly more or less than the average indicated.

Many large companies are in several fields, yet are listed in only their primary industry sector.

A related distortion also may result because a large subsidiary may not be included in the industry in which it competes.

Finally, a few large companies are privately held and their figures are not included.

The forecast portion of Pansophic's report predicts food companies will lead all industries in advertising expenditures in 1988 with $8.6 billion. Retail department stores are expected to take second place with $4.7 billion, followed by motor vehicles at $4.5 billion.

Among the industries expected to show major percentage increases in advertising investments next year are ship and boat building, with a growth rate of 58.5%, and knitting mills, with a growth rate of 49.2%.

Other high advertising growth industries predicted by the study include aircraft parts, up 31.7%; gold and silver ores, up 27.6%; dental equipment supplies, up 26.7%; radio, TV and music stores, up 24.3%; and real estate agents, up 22.4%.

Among individual companies, Pansophic forecasts combined worldwide expenditures for Unilever will top the list in 1988 with an advertising total of $2.4 billion, ahead of Philip Morris Cos. at $2 billion. Procter & Gamble Co.; Sears, Roebuck & Co.; General Motors Corp.; and Ford Motor Co. all are projected to top the $1 billion mark in ad expenditures, with RJR Nabisco expected to come in just below $1 billion.

Among the top-spending Japanese companies, Honda is expected to spend $796.9 million in advertising next year, followed by Matsushita Electric at $584.4.

Pansophic, a leading packaged software company, acquired "Ad$ Forecasts" from Schoenfeld & Associates in February 1986. A copy of the 184-page study is available for $325 ($300 prepaid) from the Pansophic Systems office at 1550 Northwest Highway, Park Ridge, Ill. 60068. #

## Advertising-to-sales ratios, 1986 (By industry)

Source: Panasophic Systems Inc., 1550 Northwest Highway, Park Ridge, Ill. (312) 390-7711. Legend: SIC - Standard industrial classification. NEC - Not elsewhere classified. Ad dollars as per cent of sales - Ad expenditures/net sales. Ad dollars as per cent of margin - Ad expenditures/(net sales--cost of goods sold). Annual growth rate of advertising dollars.

| Industry | SIC no. | Ad dollars as per cent of sales | Ad dollars as per cent of margin | Annual growth rate (%) |
|---|---|---|---|---|
| Abrasive, asbestos, misc mnrl | 3290 | 1.3 | 4.4 | 9.9 |
| Advertising Agencies | 7311 | 0.1 | 0.5 | 13.1 |
| Agricultural Chemicals | 2870 | 0.2 | 1.7 | 9.1 |
| Agricultural Prodtn-Livestock | 200 | 1.5 | 5.2 | (7.0) |
| Agricultural Production-Crops | 100 | 2.3 | 7.4 | 8.3 |
| Air Transportation, Certified | 4511 | 2.2 | 14.5 | 10.2 |
| Aircraft | 3721 | 0.2 | 1.2 | (18.4) |
| Alarm & Signaling Products | 3669 | 2.4 | 6.3 | 12.9 |
| Apparel & Other Finished Pds | 2300 | 2.3 | 6.6 | 5.5 |
| Apparel & Accessory Stores | 5600 | 2.4 | 6.1 | 13.5 |
| Apparel, Piece Gds, Notns-Whsl | 5130 | 2.3 | 9.8 | 4.1 |
| Auto Dealers, Gas Stations | 5500 | 3.2 | 11.7 | 19.0 |
| Auto Repair, Services, Garages | 7500 | 2.7 | 4.1 | 5.9 |
| Automatic Regulating Controls | 3822 | 1.1 | 3.3 | 12.1 |
| Autos & Other Vehicles-Whsl | 5012 | 4.4 | 18.5 | 5.8 |
| Bakery Products | 2050 | 2.1 | 4.3 | 8.0 |
| Biological Products | 2831 | 2.4 | 4.8 | 16.3 |
| Blast Furnaces & Steel Works | 3310 | 2.1 | 14.2 | 14.7 |
| Bolt, Nut, Screw, Rivets, Washrs | 3452 | 1.0 | 4.2 | 5.9 |
| Books: Pubg, Pubg & Printing | 2731 | 4.1 | 7.2 | 9.5 |
| Bottled & Canned Soft Drinks | 2086 | 6.5 | 11.7 | 8.8 |
| Business Credit Institutions | 6150 | 0.2 | 0.3 | 12.0 |
| Business Services, NEC | 7399 | 3.8 | 8.6 | 7.4 |
| Cable Television Operations | 4891 | 1.6 | 2.4 | 15.7 |
| Can, Preserve Fruit, Vegetable | 2030 | 6.1 | 16.6 | 8.2 |
| Candy & Other Confectionery | 2065 | 10.7 | 26.6 | 9.4 |
| Catalog Showrooms | 5334 | 3.5 | 16.6 | 10.2 |
| Chemicals & Allied Pds-Whsl | 5161 | 20.6 | 32.3 | 12.6 |
| Chemicals & Allied Prods | 2800 | 2.1 | 5.9 | 3.0 |
| Cigarettes | 2111 | 7.2 | 14.8 | 12.5 |
| Cigars | 2121 | 2.0 | 2.7 | 4.2 |
| Cmp Program & Software Svcs | 7372 | 3.0 | 7.4 | 13.4 |
| Comm & Signaling devices, NEC | 3669 | 1.2 | 2.7 | 2.7 |
| Commercial Printing | 2750 | 1.4 | 3.9 | 10.8 |
| Commercial Testing Labs | 7397 | 1.6 | 4.8 | 5.9 |
| Communication Services, NEC | 4899 | 3.1 | 11.0 | (6.7) |
| Computer & Data Process Svcs | 7370 | 0.6 | 1.4 | (13.0) |
| Computer Disk & Tape Drives | 3684 | 1.6 | 5.3 | 16.9 |
| Computer Equipment, NEC | 3699 | 2.2 | 4.9 | 17.7 |
| Computer Graphics Systems | 3686 | 1.5 | 2.7 | 13.6 |
| Computer Peripherals | 3688 | 2.5 | 7.0 | 3.1 |
| Computer Related Svcs, NEC | 7379 | 1.4 | 2.1 | (3.2) |
| Computer Stores | 5995 | 2.9 | 12.0 | 21.1 |
| Computer Terminals | 3693 | 2.1 | 4.8 | 9.4 |
| Computers-Mainframe | 3682 | 1.3 | 2.1 | 15.1 |
| Computers-Mini & Micro | 3681 | 5.7 | 12.4 | 7.5 |
| Constr, Mining, Matl Handle Eq | 3530 | 1.9 | 6.2 | (0.8) |
| Construction Machinery & Eq | 3531 | 1.1 | 4.2 | 12.1 |
| Construction-Not Bldg Constr | 1600 | 1.7 | 11.1 | (7.4) |
| Construction-Special Trade | 1700 | 1.0 | 3.5 | 10.5 |
| Convenience Stores | 5412 | 0.4 | 1.7 | 14.2 |
| Convrt Paper, Paprbrd Pd, NEC | 2649 | 2.1 | 4.5 | 7.1 |
| Credit Reporting Agencies | 7321 | 0.9 | 3.9 | 8.5 |
| Crude Petroleum & Natural Gas | 1311 | 0.1 | 0.2 | (14.5) |
| Dairy Products | 2020 | 5.7 | 18.7 | 5.8 |
| Data Processing Services | 7374 | 1.0 | 3.2 | 7.9 |
| Dental Equipment & Supplies | 3843 | 2.7 | 5.8 | 26.7 |
| Department Stores | 5311 | 3.1 | 13.5 | 6.2 |
| Detective & Protective Services | 7380 | 2.6 | 10.0 | (5.8) |
| Distill, Rectify, Blend Liquor | 2085 | 13.6 | 27.2 | 8.9 |
| Drug & Proprietary Stores | 5912 | 1.5 | 5.4 | 9.7 |
| Drugs | 2830 | 9.3 | 13.6 | 4.8 |
| Drugs & Proprietary-Whsl | 5120 | 0.7 | 4.6 | 2.8 |
| Durable Goods-Whsl, NEC | 5099 | 5.3 | 20.5 | 9.8 |
| Eating Places | 5812 | 3.8 | 17.6 | 11.2 |
| Educational Services | 8200 | 4.7 | 10.9 | 15.3 |
| Elec Apparatus & Equip-Whsl | 5063 | 0.6 | 2.7 | 15.8 |
| Elec Meas & Test Instruments | 3825 | 1.5 | 3.3 | 0.8 |
| Elec Transmission & Distr Eq | 3610 | 1.0 | 2.9 | 11.1 |
| Elec, Electr Mach, Eq, Supply | 3600 | 2.0 | 6.4 | 10.7 |
| Electc Lighting, Wiring Eq | 3640 | 1.1 | 3.0 | 5.7 |
| Electric Industrial Apper | 3620 | 2.1 | 8.4 | (0.6) |
| Electric Machy, Equip, NEC | 3699 | 4.8 | 14.8 | 4.2 |
| Electric Comp, Accessories | 3670 | 1.3 | 4.1 | 12.1 |
| Electronic Components, NEC | 3679 | 2.6 | 7.0 | 6.0 |
| Electronic Computing Equip | 3680 | 1.2 | 2.6 | 8.5 |
| Electric Parts & Eq-Whsl | 5065 | 1.3 | 4.3 | 3.0 |
| Engines & Turbines | 3510 | 2.7 | 10.0 | 5.7 |
| Engr, Architect Survey Svcs | 8911 | 0.4 | 1.8 | 7.3 |
| Engr, Lab & research Eq | 3811 | 1.7 | 3.8 | 13.8 |
| Eq Rental & Leasing Svcs | 7394 | 3.5 | 6.2 | 10.5 |
| Fabricated Metal Pds, NEC | 3499 | 1.9 | 3.5 | 1.6 |
| Fabricated Rubber Pds, NEC | 3089 | 1.5 | 2.9 | 6.7 |
| Farm & Garden Machinery & Eq | 3520 | 1.5 | 7.8 | 8.2 |
| Finance Lessors | 6172 | 0.9 | 0.8 | 4.3 |
| Finance-Services | 6199 | 2.7 | 10.8 | 10.5 |
| Floor Covering Mills | 2270 | 0.9 | 3.7 | 2.8 |
| Flour & Other Grain Mill Pds | 2041 | 1.3 | 8.6 | (5.0) |
| Food & Kindred Products | 2000 | 5.8 | 21.9 | 9.0 |
| Food Preparations, NEC | 2099 | 3.6 | 10.8 | 11.7 |
| Footwear, Except Rubber | 3140 | 4.2 | 10.2 | (4.7) |
| Freight Forwarding | 4712 | 2.8 | 12.0 | 28.1 |
| Fuel & Ice Dealers | 5980 | 0.6 | 3.8 | (4.7) |
| Furniture Stores | 5712 | 5.8 | 12.9 | 14.3 |
| Gen Bldg Contractor-resdntl | 1520 | 2.4 | 6.7 | 27.4 |
| Gen Bldg Contractors-Nonres | 1540 | 0.2 | 2.1 | 5.3 |
| General Industrial Mach & Eq | 3560 | 0.6 | 2.0 | 5.8 |
| Glass Containers | 3221 | 1.5 | 5.5 | 6.6 |
| Gold & Silver Ores | 1040 | 2.1 | 12.0 | 27.6 |
| Greeting Card Publishing | 2771 | 4.4 | 7.7 | 8.8 |
| Groceries & Related Pds-Whsl | 5140 | 0.7 | 4.7 | 1.7 |
| Grocery Stores | 5411 | 1.5 | 6.2 | 7.4 |
| Guided Missiles & Spacec Vehc | 3760 | 0.1 | 0.5 | 8.6 |
| Hardware, NEC | 3429 | 11.0 | 21.4 | 6.7 |
| Hardwr, Plumb, Heat Eq-Whsl | 5070 | 5.9 | 41.6 | 18.4 |
| Health & Allied Services, NEC | 8091 | 1.4 | 4.5 | 13.2 |
| Heating Eq, Plumbing Fixture | 3430 | 2.4 | 8.7 | 14.9 |
| Hoists, Indl Cranes, Monorail | 3536 | 1.3 | 4.3 | 11.6 |
| Hospitals | 8060 | 0.8 | 4.6 | 11.9 |
| Hotels, Motels, Tourist Courts | 7011 | 3.5 | 12.9 | 6.0 |
| Household Appliance Stores | 5722 | 3.8 | 12.6 | 29.2 |
| Household Appliances | 3630 | 4.1 | 14.6 | 16.4 |
| Household Furniture | 2510 | 2.7 | 9.5 | 13.0 |
| Indl Inorganic Chemicals | 2810 | 18.4 | 40.2 | 8.9 |
| Indl Trucks, Tractors, Trailers | 3537 | 0.9 | 5.3 | (8.3) |
| Industrial Controls | 3622 | 1.6 | 6.5 | 8.8 |
| Industrial Measurement Instr. | 3823 | 1.7 | 3.9 | 2.4 |
| Industrial Organic Chemicals | 2860 | 1.1 | 2.9 | 14.1 |
| Ins Agent, Brokers & Service | 6400 | 0.5 | 1.9 | 27.3 |
| Intercity, Rural Highway Trans | 4131 | 4.3 | 73.5 | 12.3 |
| Investors, NEC | 6799 | 0.4 | 1.7 | (100.0) |
| Jewelry Stores | 5944 | 5.1 | 10.1 | 7.0 |
| Jewelry, Precious Metal | 3911 | 3.1 | 7.7 | 15.3 |
| Knitting Mills | 2250 | 2.3 | 7.5 | 49.2 |
| Leather Goods, NEC | 3199 | 5.2 | 12.3 | 12.8 |
| Lumber & Oth Bldg Matl-Retl | 5211 | 2.8 | 9.2 | 15.5 |
| Lumber & Constr Matl-Whsl | 5030 | 1.0 | 4.8 | 12.0 |
| Machinery & Equipment-Whsl | 5080 | 1.8 | 7.7 | 18.2 |
| Mail Order Houses | 5961 | 14.5 | 38.5 | 15.7 |
| Malt Beverages | 2082 | 8.9 | 23.2 | 9.1 |
| Manifold Business Forms | 2761 | 0.9 | 2.4 | 8.5 |
| Meas & Controlling Dev, NEC | 3829 | 1.0 | 2.1 | 4.7 |
| Measuring, Controlling Instr | 3820 | 2.0 | 4.6 | 8.5 |
| Meat Products | 2010 | 1.8 | 12.7 | 12.8 |
| Medical & Dental Labs | 8070 | 1.1 | 2.5 | 10.7 |
| Medicinal Chems, Botanid Pds | 2833 | 0.6 | 0.9 | 0.1 |
| Metal Cans, Shipping Contain | 3410 | 8.3 | 53.7 | 15.6 |
| Metal Doors, Frames, Mold, Trim | 3442 | 1.9 | 6.2 | 5.8 |
| Metal Forging and Stampings | 3460 | 1.4 | 4.9 | 5.6 |
| Metalworking Machinery & Eq | 3540 | 4.1 | 11.8 | 15.0 |
| Mgmt, Consulting & PR Svcs | 7392 | 1.2 | 4.9 | (3.5) |
| Mineral Royalty Traders | 6795 | 0.7 | 1.3 | (16.6) |
| Misc Amusement & Rec Services | 7990 | 4.8 | 14.1 | 14.9 |
| Misc Chemical Products | 2890 | 3.3 | 8.3 | 5.8 |
| Misc Furniture & Fixtures | 2590 | 1.9 | 4.7 | 21.0 |
| Misc Machinery, Ex Electrical | 3590 | 1.2 | 3.7 | 13.8 |
| Misc Manufacturing Industries | 3990 | 5.2 | 11.3 | 7.9 |
| Misc Plastic Products | 3079 | 1.5 | 4.4 | 14.2 |
| Misc Retail Stores, NEC | 5999 | 2.8 | 8.4 | 9.3 |
| Misc Transportation Equip | 3790 | 0.2 | 0.9 | 10.8 |
| Miscellaneous Metal Work | 3449 | 0.9 | 1.8 | (15.4) |
| Mobile Home Dealers | 5270 | 1.3 | 4.7 | 34.9 |
| Mortgage Bankers & Brokers | 6160 | 0.7 | 1.1 | 14.0 |
| Motion Pictures Prodctn, Servc | 7810 | 9.5 | 21.0 | 3.1 |
| Motion Picture Theaters | 7830 | 3.5 | 16.8 | 8.2 |
| Motor Homes | 3716 | 0.9 | 5.1 | (9.8) |
| Motor Vehicle Part, Accessory | 3714 | 1.1 | 4.6 | (3.5) |
| Motor Vehicles & Car Bodies | 3711 | 1.6 | 9.6 | 8.6 |
| Motorcycles, Bicycles & Parts | 3750 | 1.7 | 6.9 | 3.9 |
| Musical Instruments | 3931 | 4.1 | 11.1 | 7.8 |
| Newspaper: Pubg, Pubg & Printi | 2711 | 2.9 | 7.1 | 26.9 |
| Nondurable Goods-Whsl, NEC | 5199 | 1.7 | 8.3 | 13.2 |
| Nursing & Personal Car Facil | 8050 | 0.9 | 5.4 | 8.7 |
| Office Automation Systems | 3697 | 1.7 | 3.3 | 7.8 |
| Office Furniture | 2520 | 1.4 | 3.6 | 6.1 |
| Office Computing, Acctng Mach | 3570 | 1.2 | 2.0 | 9.0 |
| Oil & Gas Field Expl Svcs | 1382 | 1.1 | 3.4 | 11.2 |
| Oil Field Machinery & Equip | 3533 | 0.5 | 1.5 | (15.4) |
| Oil, Gas Field Services, NEC | 1389 | 1.1 | 3.6 | (27.6) |
| Operative Builders | 1531 | 1.7 | 10.6 | 13.2 |
| Operators-Nonres Bldgs | 6512 | 3.6 | 7.5 | 9.5 |
| Ophthalmic Goods | 3851 | 2.6 | 5.3 | 19.2 |
| Optical Character, Laser Scan | 3695 | 1.0 | 2.0 | 6.1 |
| Optical Instruments & Lenses | 3830 | 1.9 | 4.2 | 12.9 |
| Ordnance & Accessories | 3480 | 4.2 | 15.4 | 17.5 |
| Ortho, Prosth, Surg Appl, Supl | 3842 | 2.1 | 5.2 | 12.2 |
| Outpatient Care Facilities | 8081 | 1.8 | 17.3 | 24.2 |
| Paint, Varnishes, Lacquers | 2850 | 2.7 | 7.1 | (2.8) |
| Paper & Allied Products | 2800 | 1.5 | 5.8 | 4.3 |
| Patent Owners & Lessors | 6794 | 2.0 | 6.8 | 7.2 |
| Paving & Roofing Materials | 2950 | 1.0 | 2.8 | 15.1 |
| Pens, Pencils, Other Office Mat | 3950 | 5.3 | 11.5 | 9.0 |
| Perfume, Cosmetic, Toilet Prep | 2844 | 9.4 | 14.6 | 5.6 |
| Periodical: Pubg, Pubg & Print | 2721 | 3.9 | 7.6 | 6.3 |
| Personal Credit Institutions | 6140 | 1.5 | 2.6 | 3.6 |
| Personal Services | 7200 | 6.6 | 19.6 | 12.4 |
| Personal Supply Services | 7360 | 1.7 | 7.6 | 11.3 |
| Petroleum & Pet Pds-Whsl | 5170 | 0.4 | 3.1 | 16.2 |
| Petroleum Refining | 2911 | 0.3 | 0.9 | (5.6) |
| Pharmaceuticals | 2834 | 6.9 | 11.4 | 9.3 |
| Phono Records, Magnetic Tape | 3652 | 8.7 | 19.1 | 29.3 |
| Photofinishing Laboratories | 7395 | 1.9 | 4.6 | 1.8 |
| Photographic Equip & Supply | 3861 | 3.4 | 7.1 | 7.9 |
| Plastic Matl, Synthetic resin | 2820 | 0.9 | 2.8 | 8.5 |
| Pollution Control Machinery | 3568 | 1.2 | 4.2 | 16.1 |
| Pottery Products, NEC | 3269 | 1.0 | 6.1 | 0.0 |
| Prefab Metal Bldgs & Comp | 3448 | 1.0 | 4.5 | 5.8 |
| Prep Feeds For Animals, NEC | 2048 | 9.2 | 19.7 | 7.5 |
| Printing, Publishing & Allied | 2700 | 5.0 | 13.5 | 76.1 |
| Racing, Id Track Operations | 7948 | 5.3 | 39.9 | 24.2 |
| Radio & TV Broadcasting | 4830 | 3.8 | 10.0 | 15.2 |
| Radio & TV Receiving Sets | 3651 | 2.3 | 7.1 | 11.0 |
| Radio, TV Comm Eq, Apparatus | 3663 | 0.8 | 2.4 | 2.4 |
| Radio, TV & Music Stores | 5730 | 4.9 | 15.1 | 24.3 |
| Real Estate | 6500 | 3.4 | 8.1 | 6.7 |
| Real Estate Agents & Mgrs | 6531 | 3.6 | 11.7 | 22.4 |
| Real Estate Dealers | 6532 | 0.9 | 2.3 | 13.7 |
| Real Estate Investment Trust | 6798 | 1.5 | 4.1 | 5.8 |
| Refrig & Service Ind Machines | 3580 | 1.9 | 7.2 | 7.5 |
| Research & Development Labs | 7391 | 2.3 | 18.7 | 27.5 |
| Robotics | 3695 | 1.9 | 5.5 | (4.5) |
| Rolling & Draw Nonfer Metal | 3350 | 0.8 | 3.8 | 24.0 |
| Rubber & Misc Plastics Prods | 3000 | 2.0 | 7.5 | 3.3 |
| Rubber & Plastics Footwear | 3021 | 4.4 | 11.4 | 13.6 |
| Savings & Loan Associations | 6120 | 0.7 | 1.6 | 4.6 |
| Search, Navigate, Guide Sys, Eq | 3664 | 1.6 | 6.3 | 3.6 |
| Security & Commodity Brokers | 6200 | 0.6 | 6.5 | 9.3 |
| Semiconductor, Related Device | 3674 | 1.3 | 3.6 | (5.9) |
| Sewing, Needlework Stores | 5949 | 3.7 | 7.8 | 9.6 |
| Sheet Metal Work | 3444 | 0.8 | 3.4 | 28.2 |
| Ship & Boat Bldg & Repair | 3730 | 0.9 | 8.3 | 58.5 |
| Shoe Stores | 5661 | 1.8 | 4.6 | (6.2) |
| Silverware, Plated Ware | 3914 | 1.6 | 6.9 | (6.7) |
| Soap & Other Detergents | 2841 | 8.1 | 19.2 | 7.7 |
| Solar Energy Equip & Comp | 3437 | 2.1 | 6.0 | (16.5) |
| Special Industry Machinery | 3550 | 1.3 | 3.9 | 3.5 |
| Sporting & Recreatn Gds-Whsl | 5040 | 10.2 | 21.7 | 18.0 |
| Structural Clay Products | 3250 | 2.0 | 5.5 | 14.3 |
| Subdivid, Develop, Ex Cemetery | 6552 | 2.2 | 8.9 | 5.8 |
| Surgical, Med Instr, Apparatus | 3841 | 2.5 | 4.8 | 10.8 |
| Svcs Allied with Exchanges | 6280 | 10.8 | 20.4 | 13.7 |
| Tele & Telegraph Apparatus | 3661 | 1.3 | 3.6 | 9.0 |
| Telegraph Comm (Wire, Radio) | 4821 | 2.4 | 6.0 | 9.7 |
| Telephone Comm (Wire, Radio) | 4811 | 2.5 | 6.0 | 1.9 |
| Telephone Interconnect Sys | 4892 | 1.0 | 3.2 | 16.6 |
| Textile Mill products | 2200 | 2.2 | 10.0 | 13.1 |
| Totalizing Fluid Meters | 3824 | 1.5 | 3.9 | 0.1 |
| Toys, Amusement, Sporting Good | 3940 | 12.5 | 27.2 | 15.3 |
| Training Equip & Simulators | 3665 | 0.8 | 2.7 | (4.3) |
| Transportation Services | 4700 | 2.4 | 6.5 | (0.3) |
| Truck & Bus Bodies | 3713 | 1.6 | 9.8 | (6.4) |
| Trucking, Local, Long Distance | 4210 | 2.3 | 12.5 | 13.2 |
| Valve, Pipe Fittings, Ex Brass | 3494 | 1.0 | 3.8 | 12.8 |
| Variety Stores | 5331 | 2.3 | 8.6 | 10.1 |
| Watches Clocks & Parts | 3870 | 2.2 | 7.7 | (10.9) |
| Water Transportation | 4400 | 8.7 | 86.3 | 0.0 |
| Wet Corn Milling | 2046 | 1.2 | 4.4 | 7.8 |
| Women's Ready-to-Wear Stores | 5621 | 1.5 | 4.3 | 12.6 |
| Wood Buildings, Mobil Homes | 2450 | 1.7 | 8.0 | 3.5 |
| X-Ray, Electromedical Apparat | 3693 | 1.8 | 3.8 | 8.4 |

# Stores juggle space, specialties

By Julie Liesse Erickson

Food marketers and retailers are juggling cost, quality and variety to satisfy today's more demanding shoppers.

On both sides, these concerns have led to a dichotomy. Despite devoting more space than ever to upscale services, non-foods and premium-price items, supermarket operators realize they also need to maintain low-price dry groceries.

Price is still the No. 2 criterion for consumers deciding where to shop, according to a 1986-1987 study by Columbus, Ohio-based Impact Resources, a market-research company specializing in retail industries.

Impact surveyed more than 105,000 consumers in 16 U.S. markets. Of those respondents, 34% said location is a concern when selecting a supermarket. Some 32.9% listed price as a factor, and 24.8% cited product selection. Quality and service were distant Nos. 4 and 5, at 21.7% and 16%, respectively.

Manufacturers, for their part, are capitalizing on the power of established brand names—through line extensions and licensing ventures. Food products and beverages accounted for 7% of the U.S. licensing industry's $54.3 billion in 1986 sales, according to the Scottsdale, Ariz.-based "Licensing Letter."

At the same time, marketers are using entrepreneurial mystique to capture the consumer's imagination.

Food giants including Kraft Inc. and Pillsbury Co. are snatching up small companies—All-American Gourmet, Tombstone Pizza, Dove Candies, Haagen-Dazs and the like—to cultivate specialty product success.

Acquisitions such as Borden Inc.'s estimated $100 million purchase of Anaheim, Calif.-based snack-food marketer Laura Scudder's (AA, Sept. 28) position companies for regional marketing. Scudder's apparently completes

(Continued on Page S-2)

**U.S. grocery sales 1986**

*Total sales: $284.4 billion, up 5% from 1985*

Independent stores with sales less than $2 million
**12.5%**

Independent stores with sales more than $2 million
**16.6%**

Chain stores with sales less than $2 million
**6.3%**

Chain stores with sales more than $2 million
**64.6%**

Source: Nielsen Marketing Research estimates

# Space, specialties juggled

*(Continued from Page S-1)*

Borden's national network of regional snack companies, which includes The Snacktime Co., Indianapolis, and Chicago-based Jay's Foods.

"There's not much room in the middle any more—the industry has witnessed real polarization," says Lex N. Gamble, managing director of New York-based Kidder, Peabody & Co.'s Consumer Products Finance Group.

"It's a game of biggies and the entrepreneurs. It's hard to find middle-size companies any more, partly because capital is available to lubricate change of ownership."

He also sees this bipolar approach in specific segment battles and product introductions. "Once a market segment develops greater concentration, moves are being made to enliven it; witness the cereal market," he says. "If a category's big and has just a few players, new product activity tends to be very high.

"On the other hand, if it's highly fragmented, there's a lot less activity."

Chicago-based *New Product News* reports there were 20% more new food and drug products introduced in the first half of 1987 than in the comparable '86 period. Among food groups, the largest increases were reported in beverages, dairy products, entrees, processed meat and poultry and side dishes. Product introductions in non-foods categories rose 24%.

According to *NPN*, particularly active food categories include fruit drinks, ice cream and frozen novelties, frozen fruit and juice bars, frozen entrees, gourmet mustards and all microwave products.

New products keep supermarket inventory growing; in 1986, the average number of items in the store increased 13.7% to 19,857, according to the Washington-based Food Marketing Institute, a trade association representing more than 10,000 grocery retailers.

To accommodate new items and expanded service departments—on-site bakeries, delicatessens, service seafood, floral departments and periodical displays—retailers are building larger stores.

> ***"There's not much room in the middle any more."***
>
> **Lex N. Gamble**
> **Kidder, Peabody & Co.'s**
> **Consumer Products**
> **Finance Group**

The average size of a newly built supermarket was 43,800 square feet in 1986, up 9.5% from 1985, according to FMI. Last year, store closings in the U.S. exceeded openings, continuing a trend to reduce what FMI calls "overstoring."

With average after-tax store profit, however, falling to 1.12% in 1986, from 1.19% in 1985, supermarket operators are more cautious than ever about stocking their shelves.

"Manufacturers are rushing in—not testing as they once did. There's virtually no time at all before the product is off to the retailer," says Steve Weinstein, editor of Stamford, Conn.-based *Progressive Grocer*, a supermarket trade publication.

"That leaves the retailer continually in a quandary. Will the new product succeed? Is it backed by all the things it's supposed to have? Does it have a slotting allowance? Does the product's potential justify reslotting shelves?"

As supermarket operators have come out of the closet in demanding slotting allowances and promotional dollars in return for stocking new items, they've created the opportunity for what Mr. Gamble calls "power marketing at the retail level.

"The big trend is the emergence of the retailer as a controlling factor in the success or failure of new products.

"This involves three things: First, the retailer's become more sophisticated in reading product movement and thus has more control over the situation. Second, he's become more demanding in requirements for getting a product on the shelf."

Finally, Mr. Gamble says, "The supermarket operator has become a lot more critical to the success of a new product because the manufacturer doesn't have the same knowledge base and market force he had become used to."

In addition to widespread dependence on scanner-delivered data, large retailers also are using market research to better know their customer base in each region and tailor services and promotions, such as frequent-shopper programs.

A 1987 FMI study shows that one-third of supermarkets have created departments for specific groups of customers; 32.1% of respondents said they were designing ads for specific groups of customers.

That interest in meeting customer needs translates into a different ad emphasis for many retailers. Allen Bildner, chairman-ceo of Kings Super Markets, West Caldwell, N.J., and new chairman of FMI, says, "We are moving from purely price [advertising] to demographics and psychographics."

Supermarket operators' limited shelf space, their growing demands on manufacturers and their improved access to sales information "have combined to make the trade a much more potent factor in the life of a new product," Mr. Gamble says. AA


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# Ad pages in farm publications for 9 months, 1987-86

***Third-quarter and year-to-date figures for U.S. and Canadian publications reporting to Advertising Age***

| | Pages | | | |
|---|---|---|---|---|
| | July-Sept. 1987 | July-Sept. 1986 | Jan.-Sept. 1987 | Jan.-Sept. 1986 |
| **— Canadian —** | | | | |
| Country Guide: | | | | |
| Eastern Edition | 81.0 | 99.7 | 351.0 | 355.3 |
| National Edition | 129.2 | 150.2 | 569.8 | 598.4 |
| Western Edition | 92.2 | 101.1 | 369.6 | 419.5 |
| Le Bulletin des: | | | | |
| Agriculteurs | 138.0 | 140.5 | 531.5 | 545.3 |
| Total Group | 440.4 | 491.5 | 1,821.9 | 1,918.5 |
| % change | | -10.4% | | -5.0% |
| **— Dairy & livestock —** | | | | |
| Beef Today | 44.0 | 15.6 | 138.7 | 76.8 |
| Beef Magazine A. | — | — | — | — |
| Beefweek | — | — | — | — |
| The Cattleman | 213.8 | 232.4 | 665.2 | 776.5 |
| Dairy | 67.3 | 66.0 | 211.0 | 225.8 |
| Dairy Today | 42.0 | 32.2 | 176.7 | 140.1 |
| Dairy Herd Management | 51.2 | 33.2 | 140.0 | 117.0 |
| Drovers Journal (21X) A. | 233.4 | 230.9 | 489.8 | 563.4 |
| Feedlot Management | — | — | — | — |
| Florida Cattleman | 166.3 | 182.6 | 467.4 | 556.3 |
| Hoards Dairyman (21X) A. | 117.4 | 121.2 | 376.1 | 419.1 |
| Hogs Today | 38.1 | 31.8 | 134.2 | 111.4 |
| Hog Farm Management | 40.2 | 28.2 | 140.0 | 96.0 |
| National Hog Farmer | 116.6 | 117.3 | 443.0 | 474.3 |
| Pork '87 | 81.8 | 84.5 | 313.2 | 319.8 |
| The Hog Producer | 8.9 | 25.2 | 49.1 | 68.5 |
| S. Beef | — | — | — | — |
| Southern Beef Producer (8X) | — | — | — | — |
| Sunbelt Dairyman (6X) | — | — | — | — |
| Western Livestock Reporter | 51.4 | 57.9 | 261.6 | 291.1 |
| Total Group | 1,272.3 | 1,259.0 | 4,006.0 | 4,236.1 |
| % change | | 1.1% | | -5.4% |
| **— Fruit & vegetable —** | | | | |
| American Fruit Grower | 79.5 | 85.1 | 328.3 | 377.3 |
| American Vegetable Grower | 143.6 | 160.9 | 455.0 | 462.1 |
| Citrus & Vegetable | 147.0 | 147.9 | 436.4 | 438.5 |
| Hay & Forage Grower | — | — | — | — |
| The Citrus Industry | 103.7 | 100.9 | 314.7 | 303.3 |
| The Grower | 80.7 | 64.5 | 310.6 | 226.7 |
| Total Group | 554.5 | 559.4 | 1,845.1 | 1,807.8 |
| % change | | -0.9% | | 2.1% |
| **— General farm publications —** | | | | |
| American Agriculturalist | 50.0 | 51.0 | 193.0 | 207.0 |
| California Farmer (21X) A. | 74.0 | 102.0 | 344.0 | 425.0 |
| Colorado Rancher & Farmer | — | — | — | — |
| Farm Futures A. | 27.0 | 25.8 | 298.0 | 293.0 |
| Farm Industry News (10X) | 64.0 | 54.3 | 358.6 | 350.6 |
| Farm Journal (14X) | 57.7 | 47.3 | 473.0 | 432.0 |
| Farm Progress Group: | | | | |
| Prairie Farmer (21X) A. | 142.6 | 166.5 | 554.2 | 672.5 |
| Indiana Edition (21X) | 133.3 | 157.3 | 538.9 | 643.4 |
| Wallace's Farmer (21X) A. | 144.1 | 145.7 | 481.1 | 545.2 |
| Wisconsin Agriculturist(21X) | 84.0 | 112.2 | 309.5 | 406.0 |
| Florida Grower & Rancher | 62.8 | 70.6 | 200.8 | 244.6 |
| HBJ Farm Unit: | | | | |
| Colorado Rancher & Farmer(14X) | 56.1 | 66.9 | 182.0 | 243.7 |
| Kansas Farmer (16X) | 53.9 | 78.9 | 295.3 | 373.6 |
| Michigan Farmer (16X) | 76.3 | 91.3 | 313.4 | 362.7 |
| Missouri Ruralist (16X) | 48.7 | 65.4 | 312.9 | 415.0 |
| Nebraska Farmer(23X) | 193.3 | 195.2 | 667.3 | 761.9 |
| Ohio Farmer (16X) | 87.2 | 105.7 | 399.7 | 442.5 |
| Oklahoma Farmer-Stockman (12X) | 43.4 | 42.1 | 153.4 | 144.7 |
| Pennsylvania Farmer (16X) | 67.1 | 71.7 | 303.9 | 307.6 |
| Texas-Farmer Stockman (12X) | 30.1 | 33.5 | 145.9 | 134.2 |
| High Plains Journal: | | | | |
| Eastern Kansas (52X) | 441.4 | 417.8 | 1,351.9 | 1,397.7 |
| Colorado | 445.3 | 425.6 | 1,378.4 | 1,426.6 |
| Nebraska | 428.0 | 404.5 | 1,337.5 | 1,356.9 |
| Oklahoma-Texas | 444.5 | 433.3 | 1,375.9 | 1,402.6 |
| Western Kansas | 472.8 | 459.5 | 1,487.7 | 1,545.9 |
| Kentucky Farmer | 28.8 | 31.2 | 178.5 | 204.4 |
| Lancaster Farming (52X) | 1,698.3 | 1,607.9 | 5,377.8 | 5,165.8 |
| Pecan South (6X) | 24.8 | 18.8 | 58.4 | 64.6 |
| Progressive Farmer A. | 101.5 | 88.9 | 454.2 | 497.0 |
| Specialized Agricultural Publications: | | | | |
| Flue Cured Tobacco Farmer | — | — | 85.7 | 88.0 |
| Peanut Farmer (8X) | 9.9 | 6.8 | 102.7 | 197.3 |
| Successful Farming Now A. | 109.4 | 54.4 | 484.3 | 444.3 |
| Tennessee Farmer | 20.0 | 19.5 | 97.8 | 111.5 |
| The Farmer (24X) | 109.8 | 117.9 | 490.8 | 574.8 |
| Top Producer | 24.7 | 19.7 | 156.0 | 129.1 |
| Western Farmer-Stockman-Magazines: | | | | |
| Ariz. Farmer-Stockman (12X) | 33.6 | 48.3 | 115.2 | 171.6 |
| Idaho Farmer-Stockman (20X) | 73.2 | 70.0 | 281.4 | 357.4 |
| Mont. Farmer-Stockman (20X) | 90.0 | 92.1 | 408.8 | 484.3 |
| Ore. Farmer-Stockman (20X) | 62.3 | 55.6 | 217.9 | 273.7 |
| Utah Farmer-Stockman (20X) | 46.2 | 46.1 | 188.3 | 212.7 |
| Wash. Farmer-Stockman (20X) | 63.2 | 54.9 | 236.9 | 292.1 |
| Total Group | 6,223.3 | 6,156.1 | 22,391.0 | 23,803.4 |
| % change | | 1.1% | | -5.9% |
| **— Poultry —** | | | | |
| Broiler Industry | 150.3 | 95.1 | 450.2 | 421.9 |
| Egg Industry | 54.3 | 55.3 | 170.7 | 170.7 |
| Poultry Digest | 47.2 | 45.4 | 185.5 | 172.0 |
| Poultry & Egg News | — | — | — | — |
| Poultry Times | — | — | — | — |
| Northeast/Midwest | — | — | — | — |
| Pacific Edition | — | — | — | — |
| Southeast Edition | — | — | — | — |
| Southwest Edition | — | — | — | — |
| Poultry & Egg Marketing | — | — | — | — |
| Total Group | 251.8 | 195.8 | 806.4 | 764.6 |
| % change | | 28.6% | | 5.5% |

(X) Represents the number of times published each year; publications are monthly unless otherwise specified. A. Sectional linage included but prorated to circulation of regional editions.

All figures represented in this chart are supplied by the magazines. Advertising Age makes no attempt to verify them and, therefore, is not responsible for inconsistencies or errors.

# Promo links TV show, advertisers

## Effort battles toy-backed shows

By JAMES P. FORKAN

World Events Productions has devised an instant-winner game-card promotion to give TV stations airing "Saber Rider & the Star Sheriffs." The promotion represents an attempt by World Events to compete with syndicators of toy-supported cartoon series.

Many toy-inspired animated series in barter syndication can leverage station clearances with the attractive promise of tie-in promotions from toy giants such as Hasbro Inc. and Mattel Inc., said Brian Lacey, VP-general manager at St. Louis-based World Events.

Lacking such clout for its new space western series, World Events developed the game card and gave it and supporting materials to its carrier stations without charge.

"The stations are partners with us and can make money" by selling the sweepstakes package to local advertisers, he said.

Among the accounts committed to this local marketing effort are Wendy's in Sacramento, Calif.; Rax in Gainesville, Fla.; Show Biz in Dallas; Arby's in Minneapolis; and Pancho's in Memphis, Tenn. Toy retailers, including Toys "R" Us in Atlanta, are participating in some markets.

The broadcasters have been selling the card package to local advertisers for between $5,000 and $40,000, Mr. Lacey said. Forty-five of the 65 "Saber Rider" stations are participating in the promotion, which in most cases began Oct. 1 and in some cases will start between Oct. 15 and 21.

The card tie-in, generally running from four to six weeks, will benefit all parties, Mr. Lacey said. World Events and stations anticipate higher tune-in ratings. Local advertisers (chiefly fast-food outlets) will offer the game cards at their counters to build traffic.

To win, youngsters must scratch off three boxes decorated with sheriff stars and find three identical cartoon characters underneath; the prize is determined by scratching the fourth box.

To keep youngsters tuned in, there is a "forced viewership mechanism" on the card—a "special deputy" number that must be matched against numbers shown by the station later in the series' run, Mr. Lacey said.

Another promotion-minded syndicator, Lorimar Telepictures Corp., Culver City, Calif., has conducted local-station promotions to get its series "Thundercats" and "Silver-Hawks" off to strong starts, with prizes gleaned from tie-in toy licensees.

However, World Events' prizes include children's watches, Texas Instruments calculators, Tiger Electronics games and Wilson Sporting Goods' Michael Jordan basketballs.

World Events' major toy licensee for "Saber Rider" is Impulse Ltd., St. Louis, which plans a line of interactive toys.

Also, World Events is opting for "four-wall" theatrical distribution of the final "Voltron" series episode in about a dozen markets (where carrier stations rented a movie theater to offer free preview screenings and gifts).

It also is planning different promotions for "Vytor, the Starfire Champion" (a stripped cartoon series due in fall 1988) and for "Denver, the Last Dinosaur" (a special due in spring '88 as the first of several periodic one-hour animated specials).

World Events hopes the "Denver" special, already cleared in 50 markets, will draw "one or two national advertisers" for a promotion similar to the "Saber Rider" card idea, Mr. Lacey said. #


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